
Mississippi Management and Reporting System

Department of Finance and Administration

MMRS MASH/Training Materials		
8202	LSO Training Coordinator Guidelines	Date Revised: 08/07/2017
		Version: 3

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Magic Portal Login Information

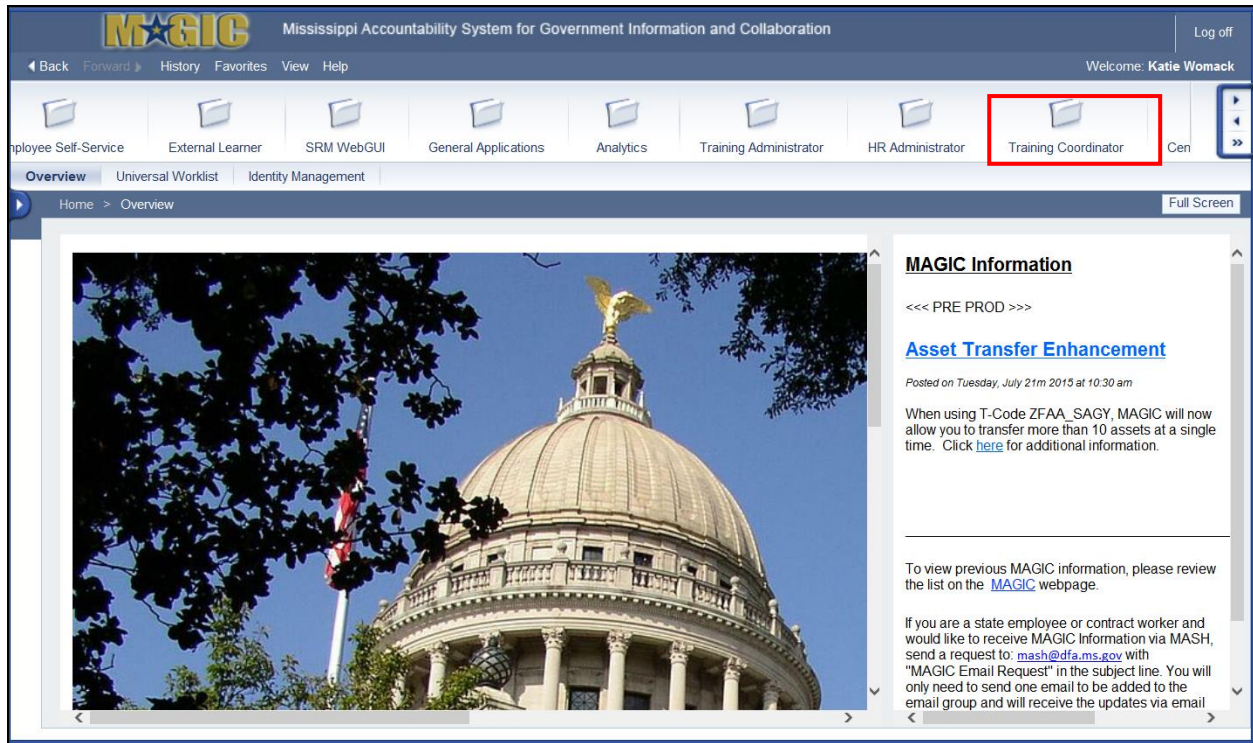
The website address used to access MAGIC is: <https://portal.magic.ms.gov/iri/portal>.

Note: If you have difficulty with viewing the training course, please review [MAGIC Technical Requirements](#) on the MMRS website for compatibility issues.

If you have problems with your password, call the MMRS Call Center at 601-359-1343.
Select Option 1 (Security) Sub-option 1 (MAGIC).



Once you log into MAGIC the following screen will appear.

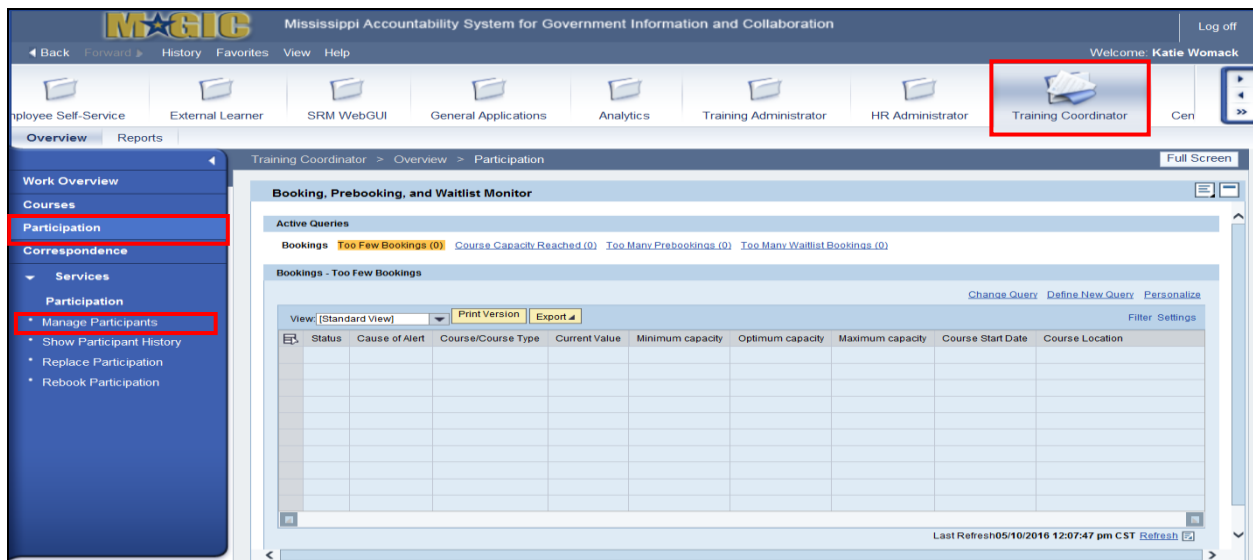


Book an Employee in Course

As your Agency's Training Coordinator, you will have the ability to directly book one or more of your employees into training sessions.

NOTE: Participants can only sign up for one occurrence of a course; they cannot choose several occurrences at the same time.

Your Action...	System Response...
1. Select the Training Coordinator tab.	The Work Overview screen will appear.



Your Action...	System Response...
2. Select the Participation .	
3. Select the Manage Participants .	The Manage Participants screen will appear.

Your Action...	System Response...
4. Type your employee's last name in the Find box to search for the employee(s) you would like to book for a training course.	
5. Select Organizational Unit , Job , Position or Person from the drop down menu under the IN space. NOTE: To enroll all of your employees, place your org unit number in the "Find" field and select your "Organization Unit" from the drop down menu.	
6. Select GO .	The requested information will be returned.
7. Highlight the employee from the "Available" box and select the arrow to insert employee into the "Selected" box.	
8. Select "Next" at the bottom of the screen.	The following screen will appear.

Your Action...	System Response...
9. Select the Book New Course for All .	The course Catalog screen will appear.

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Your Action...	System Response...
10. Select the SOMS Catalog .	A list of agencies providing training will appear.

Manage Participants [Help](#)

1 Select Participants 2 Manage Participation **a Find Course** b Adjust Payment Details 2 Manage Participation 3 Confirmation

Previous Next Back to Manage Participation

Display Selected Person (1)

Period: 01/01/2016 - 12/31/2016 [Change Period](#)

☒ Search in Course Catalog
☐ Keyword Search

Course Group	Delivery Method	Availability	Start Date	Location
Legacy Conversion			01/01/1900	
SOMS Catalog			01/01/1900	
Dept of Employment Security Cat...			01/01/1900	
Finance and Administration Cata...			01/01/1900	
Dept of Human Services Catalog			01/01/1900	
MS Development Authority Catalog			01/01/1900	
Department of Health Catalog			01/01/1900	
Public Employees Retirement Sy...			01/01/1900	
State Personal Board Catalog			01/01/1900	
SPB ADMINS			01/01/1900	
Unassigned Course Types				

Your Action...	System Response...
11. Locate the agency providing the training course.	A list of training Course Groups will appear. Browse the Course Catalog for the course, or select the radio button for "Keyword Search." The results of your search are displayed in a window on the same screen.

Options ▾

Manage Participants

Help

1 2 a b 2 3

Select Participants Manage Participation Find Course Adjust Payment Details Manage Participation Confirmation

Previous Next Back to Manage Participation

Display Selected Person (1)

Period: 01/01/2016 - 12/31/2016 Change Period

☒ Search in Course Catalog
☐ Keyword Search

Course Group	Delivery Method	Availability	Start Date	Location
▶ SAAS			01/01/1900	
▶ PROFESSIONAL DEVELOPM...			01/01/1900	
▶ STIMULUS 360			01/01/1900	
▶ ACCESS CHANNEL FOR EIM...			01/01/1900	
▶ MATA/CONTRACT AWARD			01/01/1900	
▼ SPAHRS			01/01/1900	
▶ SPAHRS MANAGE CONT...	Instructor-led Training		01/01/1990	
▶ SPAHRS HUMAN RESO...	Instructor-led Training		01/01/1990	
▼ SPAHRS PAYROLL A TO Z	Instructor-led Training		01/01/1990	
▪ SPAHRS PAYROLL A...		15 Places Available	04/22/2016	WOOLFOLK
▪ SPAHRS PAYROLL A...		13 Places Available	04/26/2016	WOOLFOLK
▶ SPAHRS TRAVEL TRAINI...	Instructor-led Training		01/01/1990	
▪ COGNOS			01/01/1900	

Your Action...	System Response...
12. Select the box next to the Course and training date you would like your employee(s) to attend.	The course is highlighted.
13. Select Next .	A cost summary of the course screen will appear.

Your Action...	System Response...
14. Select Book .	Participation was successfully booked message will appear at the top left of the page.
15. Select Next to finalize the booking.	The "What would you like to do next?" screen appears. At this point you may add more people by clicking on the link to "Select more People to Manage Participation."
16. Select the Close .	

Prebook an Employee in Course

Prebooking can be used if there are not any courses scheduled or if the scheduled dates are not convenient. Prebooking is expressing interest in attending a course at a later date.

Courses that meet your employees' prebooking criteria will appear in their **Messages and Notes** section when they are scheduled. Employees can book themselves in those courses at that time by selecting the course title or date link for the session they wish to attend and following the standard booking procedure from the "8203 LSO Employee Self Service Guidelines" located on the MMRs website under LSO Training Materials. Only one prebooking may exist for a given course in a specified time period. Their Prebook lists will reflect the most recent data entered.

NOTE: Participants can only sign up for one occurrence of a course; they cannot choose several occurrences at the same time.

Your Action...	System Response...
1. Select the Training Coordinator Tab.	The Work Overview screen appears.

Your Action...	System Response...
2. Select Participation .	
3. Select Manage Participants .	The Manage Participants screen will appear.

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Your Action...	System Response...
4. Type your employee's last name in the Find box to search for the employee(s) you would like to book for a training course	
5. Select Organizational Unit, Job, Position or Person from the drop down menu under the IN space. NOTE: To enroll all of your employees, select organization unit number.	
6. Select GO .	The requested information will be returned.
7. Highlight the employee from the "Available" box and select the arrow to insert employee into the "Selected" box.	
8. Select Next .	

Your Action...	System Response...
9. Select the Prebook Course for All .	The course Catalog screen will appear.

[illegible]

Your Action...	System Response...
10. Select the SOMS Catalog .	A list of agencies providing training will appear.

Options ▾

Manage Participants Help

1 → 2 → a → b → 2 → 3

Select Participants Manage Participation **Find Course** Adjust Payment Details Manage Participation Confirmation

Previous **Next** **Back to Manage Participation**

Display Selected Person (1)

Period: 01/01/2016 - 12/31/2016 **Change Period**

☒ Search in Course Catalog
☐ Keyword Search

Course Group	Delivery Method	Availability	Start Date	Location
▶ Legacy Conversion			01/01/1900	
▼ SOMS Catalog			01/01/1900	
▶ Dept of Employment Security Cat...			01/01/1900	
▶ Finance and Administration Cata...			01/01/1900	
▶ Dept of Human Services Catalog			01/01/1900	
▶ MS Development Authority Catalog			01/01/1900	
▶ Department of Health Catalog			01/01/1900	
▶ Public Employees Retirement Sy...			01/01/1900	
▶ State Personal Board Catalog			01/01/1900	
▶ SPB ADMINS			01/01/1900	
▶ Unassigned Course Types				

Your Action...	System Response...
11. Locate the agency providing the training course.	<p>A list of training Course Groups will appear.</p> <p>Browse the Course Catalog for the course, or select the radio button for "Keyword Search." The results of your search are displayed in a window on the same screen.</p>

Options ▾

Previous Next Back to Manage Participation


Display Selected Person (1)

Period: 01/01/2016 - 12/31/2016 Change Period

☒ Search in Course Catalog
☐ Keyword Search

Course Group	Delivery Method	Availability	Start Date	Location
▼ Finance and Administration Cata...			01/01/1900	
▶ GENIE			01/01/1900	
▶ SAAS			01/01/1900	
▶ PROFESSIONAL DEVELOPM...			01/01/1900	
▶ STIMULUS 360			01/01/1900	
▶ ACCESS CHANNEL FOR EM...			01/01/1900	
▶ MATA/CONTRACT AWARD			01/01/1900	
▼ SPAHRS			01/01/1900	
▶ SPAHRS MANAGE CONT...	Instructor-led Training		01/01/1990	
▶ SPAHRS HUMAN RESO...	Instructor-led Training		01/01/1990	
▶ SPAHRS PAYROLL A TO Z	Instructor-led Training		01/01/1990	
▶ SPAHRS TRAVEL TRAINI...	Instructor-led Training		01/01/1990	
▶ COGNOS			01/01/1900	
▶ PROGRAMMING			01/01/1900	
▶ MS ENTERPRISE LEARNIN...			01/01/1900	
▶ PAYMODE			01/01/1900	
▶ DFA-MMRS STAFF ONLY			01/01/1900	

Your Action...	System Response...
12. Select the box next to the Course and training date you would like your employee(s) to attend.	The course is highlighted.
13. Select Next .	

Your Action...	System Response...
14. Select  by the Preferred Location in order to select the location for the employee to attend. This is not a required field.	
15. Select the Preferred Start Date and Preferred End Date to select the location and dates you would prefer for the employee.	
16. Select the Prebook .	"Participation prebooking was successful" message will appear at the top of the page.
17. Select Next .	The final confirmation screen appears.
18. Select Close .	

Canceling Course Bookings

As an Agency Training Coordinator, you can also use the "Manage Participation" function to cancel your employees from trainings.

Your Action...	System Response...
1. Select the Training Coordinator tab.	The Work Overview screen appears.

[illegible]

Your Action...	System Response...
2. Select Participation tab	
3. Select Manage Participants tab.	

[illegible]

Your Action...	System Response...
4. Type your employee's last name in the Find box to search for the employee(s) you would like to cancel a training course.	
5. Select Organizational Unit, Job, Position or Person from the drop down menu under the IN space. If you'd like to cancel all of your direct reports, just place the first four digits of your org unit number followed by an asterisk (*) in the "Find" field and select your "Organizational Unit" from the drop-down menu.	
6. Select GO .	The requested information will be returned.
7. Highlight the employee from the Available box and select the arrow to insert employee into the " Selected " box.	
8. Select the Next .	

Your Action...	System Response...
9. Select the box next to the employee's name.	The name and information are highlighted, and the employee's current training activities will populate in the bottom box.
10. Select the box next to the course name.	The course is highlighted.

Your Action...	System Response...
11. Select the Cancel Participation .	A pop-up window will appear asking you to select a reason code for the cancellation.

Your Action...	System Response...
12. From the drop down arrow select a cancellation reason.	
13. Select OK .	Participation cancelled message will appear at the top of the page.
14. Select Next .	The Confirmation page will appear.
15. Select Close	

Change or Cancel Course Prebookings

As Agency Training Coordinator, you can also use the “Manage Participation” function to change or cancel your employees from their prebookings or modify their existing prebookings with a new date or location.

Change Prebooking

Your Action...	System Response...
1. Select the Training Coordinator tab.	The Work Overview screen appears.


Your Action...	System Response...
2. Select Participation tab	
3. Select Manage Participants tab.	

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Your Action...	System Response...
4. Type your employee's last name in the Find box to search for the employee(s) for which you would like to change a prebooking training course.	
5. Select Organizational Unit , Job , Position or Person from the drop down menu under the IN space. If you'd like to change all of your direct reports, just place the first 4 digits of your org unit number and an asterisk (*) in the "Find" field and select "Organizational Unit" from the drop-down menu.	
6. Select GO .	The requested information will be returned.
7. Highlight the employee from the Available box and select the arrow to insert employee into the " Selected " box.	
8. Select the Next .	

Your Action...	System Response...
9. Select the box next to the employee's name.	The name and information is highlighted and the employee's current training activities will populate in the bottom box.

Your Action...	System Response...
10. Select the Prebooked Course tab.	
11. Select the box next to the course name.	The course is highlighted.
12. Select the Change Prebooking button to modify.	The Change Prebooking window will appear which gives you the option of changing the Preferred Location, Preferred Start and End Date.

Your Action...	System Response...
13. Select  by the Preferred Location in order to select the location for the employee to attend. This is not a required field.	
14. Select the Preferred Start Date , and Preferred End Date to select the location and dates you would prefer for the employee.	
15. Select OK .	The prebooking data has been changed message will appear at the top of the page.
16. Select Next .	The final confirmation screen will appear.
17. Select Close .	

Cancel Prebooking

Your Action...	System Response...
1. Select the Training Coordinator tab.	The Work Overview screen appears.

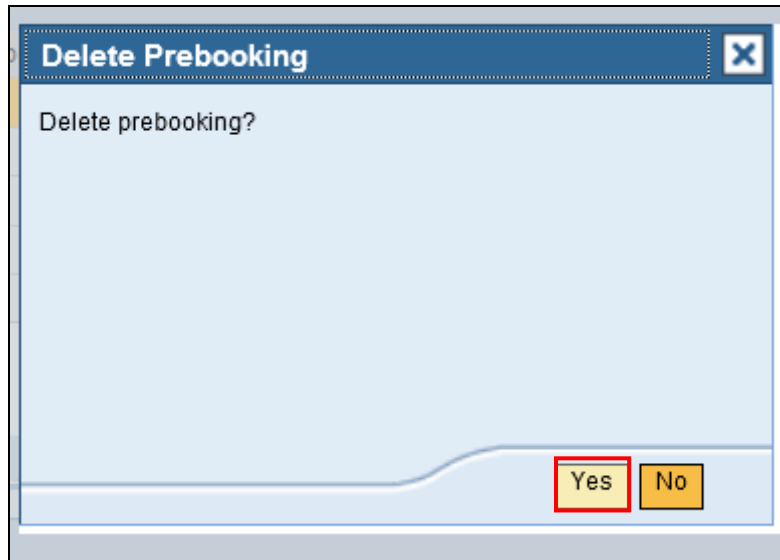
Your Action...	System Response...
2. Select Participation tab	
3. Select Manage Participants tab.	

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Your Action...	System Response...
4. Type your employee's last name in the Find box to search for the employee(s) you would like to cancel a prebooking training course.	
5. Select Organizational Unit, Job, Position or Person from the drop down menu under the IN space. If you'd like to cancel all of your direct reports, just place the first 4 digits of your org unit number and an asterisk (*) in the "Find" field and select "Organizational Unit" from the drop-down menu.	
6. Select GO .	The requested information will be returned.
7. Highlight the employee from the Available box and select the arrow to insert employee into the " Selected " box.	
8. Select the Next .	

Your Action...	System Response...
9. Select the box next to the employee's name.	The name and information is highlighted, and the employee's current training activities will populate in the bottom box.

Your Action...	System Response...
10. Select the Prebooked Course tab.	
11. Select the box next to the course name.	The course is highlighted.
12. Select the Delete Prebooking .	A Delete Prebooking window will appear.



Your Action...	System Response...
13. Select Yes .	The prebooking has been deleted message will appear at the top of the page.
14. Select Next .	The final confirmation screen will appear.
15. Select Close .	

Course Assignments

A Course Assignment does not book your employees into a course; it merely places the course in their Messages and Notes section telling them to book the first available session of the training.

Course Assignments are a way to tell your employees they need to book a course or there is training that is strongly recommended for them to attend.

Your Action...	System Response...
1. Select the Course Administration tab.	

[illegible]

Your Action...	System Response...
2. Select the Participation link.	
3. Select the Manage Mandatory Assignment link.	The Manage Required Course screen will appear.

[illegible]

Your Action...	System Response...
4. Type your employee's last name in the Find box to search for the employee(s) you would like to manage a required training course.	
5. Select Organizational Unit, Job, Position or Person from the drop down menu under the IN space. If you'd like to manage required training for all of your direct reports, just place the first 4 digits of your org unit number and an asterisk (*) in the "Find" field and select "Organizational Unit" from the drop-down menu.	
6. Select GO .	The requested information will be returned.
7. Highlight the employee from the Available box and select the arrow to insert employee into the "Selected" box.	
8. Select Next .	
9. Select the box next to the employee's name.	The name and information are highlighted.

Your Action...	System Response...
10. Select the Select New Required Course button.	The Course Catalog screen will appear.

Your Action...	System Response...
11. Select the SOMS Catalog .	A list of agencies providing training will appear.

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Your Action...	System Response...
12. Locate the agency providing the training course.	<p>A list of training Course Groups will appear.</p> <p>Browse the Course Catalog for the course, or select the radio button for "Keyword Search." The results of your search are displayed in a window on the same screen.</p>

Manage Required Courses

1 Select Persons → 2 Change Assignment → **a Find Course** → b Assign Validity Period → c Change Assignment → 3 Review and Save → 4 Confirmation

Previous Next Back to Change Assignment

Show Selected Objects (1)

Period: 01/01/2016 - 12/31/2016 Change Period

☒ Search in Course Catalog
☐ Keyword Search

Course Group	Delivery Method	Availability	Start Date	Location
▼ SOMS Catalog			01/01/1900	
▶ Dept of Employment Security Catalog			01/01/1900	
▼ Finance and Administration Catalog			01/01/1900	
▶ GENIE			01/01/1900	
▶ SAAS			01/01/1900	
▶ PROFESSIONAL DEVELOPMENT			01/01/1900	
▶ STIMULUS 360			01/01/1900	
▶ ACCESS CHANNEL FOR EMPLOYEES			01/01/1900	
▶ MATA/CONTRACT AWARD			01/01/1900	
▼ SPAHRS			01/01/1900	
▶ SPAHRS MANAGE CONTRACTS T...	Instructor-led Training		01/01/1990	
▶ SPAHRS HUMAN RESOURCES T...	Instructor-led Training		01/01/1990	
▶ SPAHRS PAYROLL A TO Z	Instructor-led Training		01/01/1990	
▶ SPAHRS TRAVEL TRAINING	Instructor-led Training		01/01/1990	

Your Action...	System Response...
13. Select the box next to the name of the training Course Type to be assigned.	The course is highlighted.
14. Select Next .	The assignment screen will appear.

Manage Required Courses [Help](#)

1 Select Persons 2 Change Assignment a Find Course **b Assign Validity Period** 2 Change Assignment 3 Review and Save 4 Confirmation

Previous Next Back to Change Assignment Assign

Assigned Required Course : SPAHRS MANAGE CONTRACTS TRAINING

Change Validity Period for All

Name	Org. Unit	Position	Start Date	End Date
Womack, Kathryn Berry	W0161	W01611590		

Previous Next Back to Change Assignment Assign

Your Action...	System Response...
15. Select the Change Validity Period for All button.	The Change Validity Period for All window will appear.

Change Validity Period for All

Start Date:

End Date:

OK Cancel

Your Action...	System Response...
16. Select the State and End Date .	
17. Select OK .	
18. Select Assign .	A summary screen will appear.

Manage Required Courses [Help](#)

1 Select Persons 2 **Change Assignment** 3 Review and Save 4 Confirmation

Previous Next Close

Selected People, Org Units, or Positions

Select New Required Course

Name	Object Type	Position	Org. Unit
Womack, Katheryn Berry	Person	W01611590	W0161

Required Courses for : Womack, Katheryn Berry

Activities

Name	Start Date	End Date	Booking Available	Assigned via	Assigned on	Action
SPAHRS MANAGE CONTRACTS TRAINING	05/11/2016	07/30/2016	<input type="checkbox"/>		05/11/2016	Will Be Assigned

Previous Next Close

Your Action...	System Response...
19. Select Next .	
20. Select Next .	The activity was completed successfully message will appear at the top of the page.
21. Select Close .	

Mandatory Assignments Report

As well as making mandatory course assignments to your employees, you can also run a brief report to check on their progress.

Your Action...	System Response...
1. Select the Course Administration tab.	

[illegible]

Your Action...	System Response...
2. Select the Participation link.	
3. Select the Mandatory Assignment Report link.	The Manage Required Course screen will appear.

Options ▾

Manage Required Courses

Menu ▾

Save as Variant...

Back

Exit

Cancel

System ▾

Execute

Select Criteria

Course Type

Course ID


Learner Type


Learner ID

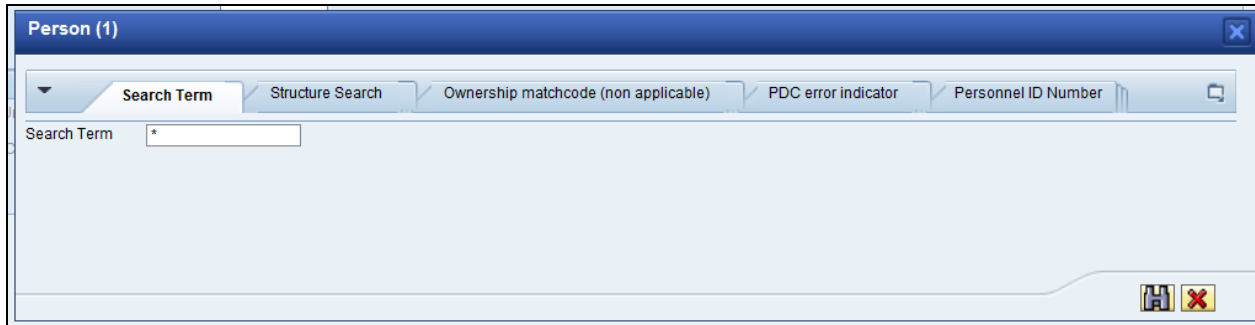
☐ Show Organizational Units



☐ Show Indiv. Required Courses

SAP

► | PEA (100)  | mppead00

Your Action...	System Response...
4. Select P Person from Learner Type drop down box.	
5. Select the  beside the Learner ID field.	The Person search screen will appear.



Your Action...	System Response...
6. Enter the employee's last name in the search field.	
7. Select the  .	The search results will appear.
8. Select the employee's name.	The row is highlighted.
9. Select the  to confirm your selection.	The Learner ID field populates with the employee's personnel number.
10. Select Execute .	The resulting report will show you the employee's mandatory assignments and whether they have booked or completed them.

Employee Training Transcript

As the Agency Training Coordinator, you can run your employee's training transcript at any time.

Your Action...	System Response...
1. Select the Training Coordinator tab.	The Work Overview screen appears.

The screenshot shows the MAGIC (Mississippi Accountability System for Government Information and Collaboration) interface. The user is logged in as Katie Womack. The top navigation bar includes links for Back, Forward, History, Favorites, View, and Help. The main navigation area has icons for Home, Employee Self-Service, External Learner, General Applications, Training Coordinator (highlighted with a red box), Course Administration, Training Administrator, and Central Trainin. Below this, the 'Overview' and 'Reports' tabs are visible, with 'Reports' also highlighted with a red box. The left sidebar contains a 'Work Overview' section with links for Courses, Participation, Correspondence, Services, and General. The main content area displays the 'Worklist of Courses' page, which includes a table of courses for the current week (306) and options to change queries, define new queries, and personalize the view. The table lists courses such as 'ASCP ONLINE ORIENTATION', 'PROCUREMENT OVERVIEW & NAV-ELEARNING', 'EMPLOYMENT DISC & WORKPLACE HARR', 'ETHICS IN STATE GOVERNMENT - ONLINE', and 'APPROVAL USING WORKFLOW -ELEARNING'.

Your Action...	System Response...
2. Select the Reports tab.	A listing of reports will appear.



The screenshot shows the 'Reports' page in the MAGIC system. The 'Reports' tab is selected in the top navigation bar. The left sidebar shows the 'Participation' section highlighted with a red box. The main content area displays a list of reports under the 'Participation' and 'Courses' categories. The 'Participation' reports include 'Course Transcript Report' (highlighted with a red box), 'Booking Approval Status Report', 'Participant List', 'Bookings per Participant', 'Participation Prerequisites', 'Participant's Qualifications', 'Prerequisites Matchup', 'Prebookings per Course Type', 'Prebookings per Participant', 'Participants for Rebooking', and 'Participation Statistics'. The 'Courses' reports include 'Course Schedule', 'Course Dates', 'Resource List per Course', and 'Course Prices'. Each report has a brief description of its function.

Your Action...	System Response...
3. Select the Course Transcript Report link.	The Prompts screen will appear.

The screenshot shows the 'Prompts' dialog box in the 'Course Transcript Admin Ver.' application. The 'Course Start Date (optional)' field is highlighted with a red rectangle and contains the date '5/19/2016'. The 'Prompts Summary' list on the left includes 'Course Start Date 5/19/2016'. The 'OK' and 'Cancel' buttons are visible at the bottom right of the dialog box.

Your Action...	System Response...
4. Select the Course Start Date and enter the current date.	

The screenshot shows the 'Prompts' dialog box in the 'Course Transcript Admin Ver.' application. The 'Participant Last Name (optional)' field is highlighted with a red rectangle. The 'Prompts Summary' list on the left includes 'Participant Last Name' and 'Course Start Date 5/19/2016'. The 'OK' and 'Cancel' buttons are visible at the bottom right of the dialog box.

Your Action...	System Response...
5. Select the Participant Last Name and enter the employee's last name <i>in all capital letters</i> .	
6. Select  to search for the employee.	The employee's last name appears in the left hand box.
7. Press  to move the name to the box on the right.	
8. Select OK .	The transcript appears for all people with the same last name.